

Free Tax Filing Programs

Agencies Accepting Appointments for Help Preparing Tax Forms:

Two local organizations that will be offering opportunities for senior citizens to schedule an appointment for assistance in preparation of their tax return;

United Way of Bay County -
accepting calls for appointments
starting - Monday, January 17, 2011
893-7508 ext. 19
between 8:00 - 4:00 p.m. Monday - Friday
Income guidelines: \$43,000 or less

Mid-Michigan Community Action Agency -
accepting calls for appointments
starting - immediately
894-9060
between 8:00 - 12:30 - 1:30 - 4:30 p.m. Mon - Thurs
8:00 - 12:30 - 1:30 - 4:00 p.m. Friday
Income guideline: \$27,075 single, \$36,425 married

**Neither of these programs provide assistance on a walk-in basis;
advance appointments must be made.**

Special Note: If a senior citizen is completely homebound or lacks transportation to attend a scheduled tax appointment the Bay County Division on Aging can assist to coordinate transportation to tax appointment location or assist with getting tax information from home bound senior to the tax preparer. These helping services can be requested by calling the main office at 895-4100 to speak with your Case Manager, or if you are over 60 years of age and not currently working with a Case Manager call Debbie Keyes at 893-5834.

Materials needed to complete necessary tax forms and tax credits:

All proof of income; W-2 forms, 1099 Forms, DHS/FIP statement, SSI/SSDI/Social Security Reports (can be obtained from the SS office), Child Support, Unemployment, Workmen's Compensation, Court Settlements, Any Gambling Winnings, Interest Statements, from banks, for savings and all interest earning accounts, Any other forms, reports, proofs of income you may receive.

A copy of last year's return

Your Social Security Card (your spouse's and dependents, if applicable)

Heating bills for January 2010 through December 2010 (or a total for the year), if you are eligible for Home Heating Credit

January 2010 through December 2010 Rent Receipts from you Landlord(s) with addresses of all landlords

If you pay day care for your children, receipts for child care expenses in 2010

Name, address and social security number (or EIN number) of day care provider

Premiums for any supplemental health insurance including Medicare Part D along with premiums for car insurance if carrying full coverage

If you own your own house, your property tax bills (winter and summer) for 2010

Your bank's routing number and your account number to direct deposit your refund

Tuition statements from college or university

